

# Office of Intergovernmental Relations Performance Plan

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Melanie Wenger, Director  
10/7/2008

# Agenda

- **Welcome and Introductions**
- IGR At-A-Glance
- Hiring Freeze
- Headline Measures
- Wrap-up



## CountyStat Principles

- **Require Data Driven Performance**
- **Promote Strategic Governance**
- **Increase Government Transparency**
- **Foster a Culture of Accountability**



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## IGR's Contribution to Montgomery Results

- A Responsive and Accountable County Government
- Affordable Housing in an Inclusive Community
- An Effective and Efficient Transportation Network
- Children Prepared to Live and Learn
- Healthy and Sustainable Communities
- Safe Streets and Secure Neighborhoods
- A Strong and Vibrant Economy
- Vital Living for all of Our Residents

*The Office of Intergovernmental Relations, through its State, Federal, and local advocacy efforts, helps support all of the Montgomery County Results.*



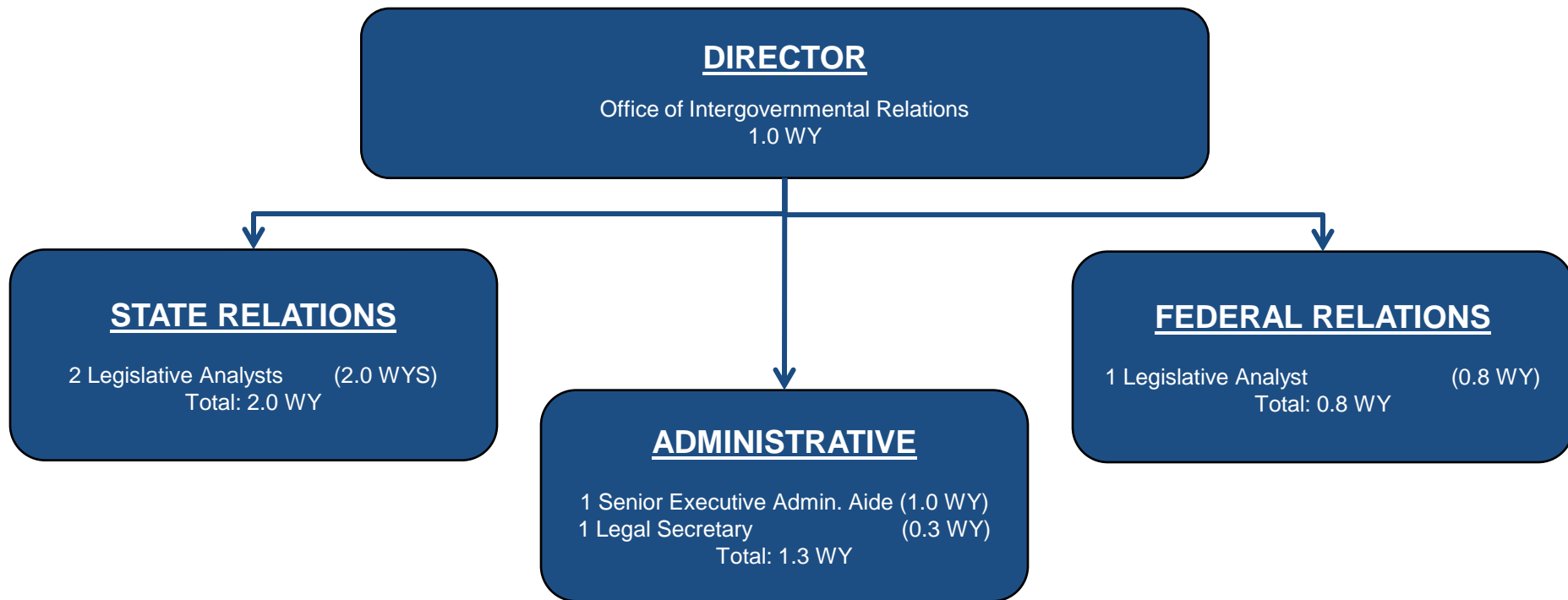
# IGR At-A-Glance

What IGR Does and for Whom	How Much (FY09 Budget)	
	State	Federal*
<b>Overall:</b> Represent County interests at municipal, regional, state, and federal levels	<ul style="list-style-type: none"> <li>▪ <b>FY09 Budget:\$657,488</b></li> <li>▪ <b>4.15 WY</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ \$252,221</li> <li>▪ 1.25 WY</li> </ul>
<b>Remove Impediments</b> Work within the legislative process to remove financial and statutory barriers that create impediments to achieving Montgomery County Results	<ul style="list-style-type: none"> <li>▪ 253,433</li> <li>▪ 1.55 WYs</li> </ul>	<ul style="list-style-type: none"> <li>▪ \$90,799</li> <li>▪ 0.45 WY</li> </ul>
<b>Program Preparation</b> Prepare and shepherd the annual state legislative program and the annual federal priorities request through the process	<ul style="list-style-type: none"> <li>▪ \$212,558</li> <li>▪ 1.3 WYs</li> </ul>	<ul style="list-style-type: none"> <li>▪ \$80,711</li> <li>▪ 0.4 WY</li> </ul>
<b>Liaison</b> Serve as liaison with state government, the County's state delegation, and Congressional staff	<ul style="list-style-type: none"> <li>▪ \$212,558</li> <li>▪ 1.3 WYs</li> </ul>	<ul style="list-style-type: none"> <li>▪ \$80,711</li> <li>▪ 0.4 WY</li> </ul>

\*The federal total includes a \$48,000 contribution from the State and Prince George's County to help underwrite the cost of BRAC-related contract lobbying services



# Organization Structure



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# Hiring Freeze

## IGR Frozen Positions as of 10/4/08

- None

## Hiring Freeze Effects

- None



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# IGR's Headline Performance Measures

## Original Measures

1. State and Federal Funds
2. Initiatives Fully or Partially Realized

## New Measures

1. Percent of County Operating Budget
  1. Direct State Aid
  2. State Retirement Payments
  3. State Capital Funds Appropriated
2. Congressionally Designated Projects
3. Percent of State Legislative Package Where County Prevailed
4. Percent of State Priorities Partially or Fully Realized
5. Percent of Federal Priorities Partially or Fully Realized

**Intergovernmental Relations (IGR) has expanded its original two measures into five new measures.**



# Comparison of Headline Measures to IGR Functions

	Measure #				
	1	2	3	4	5
Remove Impediments	X	X	X	X	X
Program Preparation	X	X	X	X	X
Liaison	X	X	X	X	X



# Definitions

- **Direct State Aid**

- State funds to help support the costs of providing certain locally delivered public services

- **State Retirement Payments**

- Payments made by the State on behalf of certain local employees who are members of the State pension and retirement systems

- **Congressionally Designated Projects**

- Federal discretionary funds allocated by a specific member of Congress for a designated purpose

- **State Legislative Package**

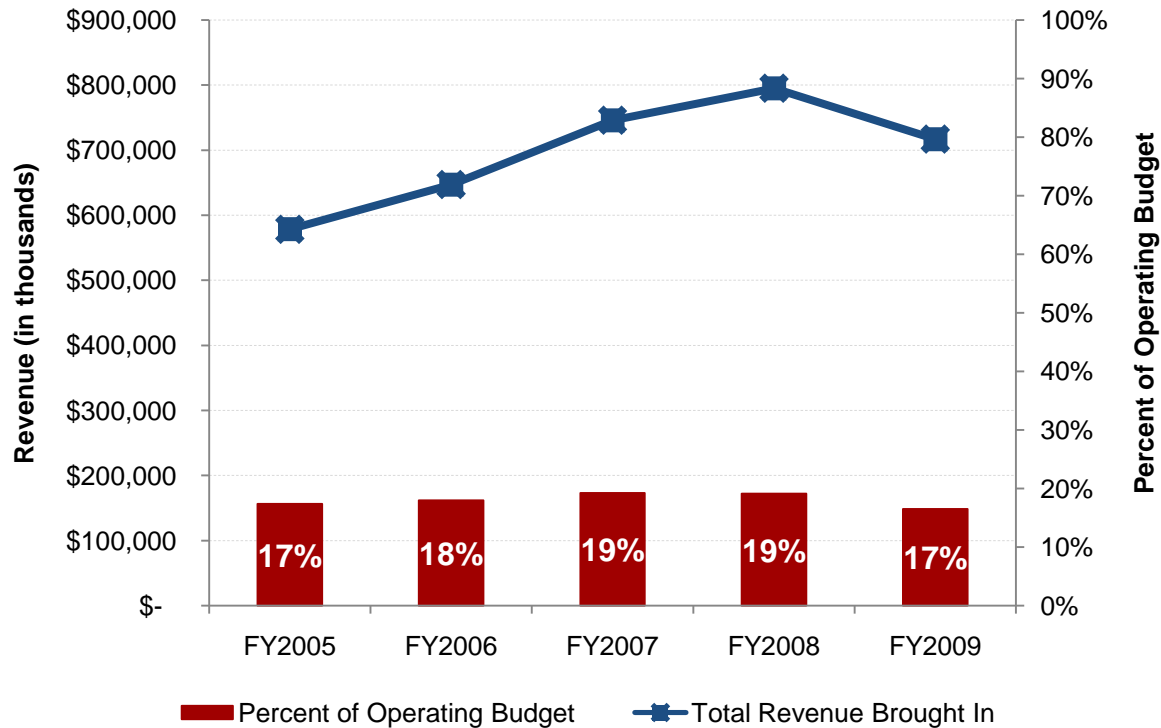
- State legislation that impacts only Montgomery County or a Bi-County agency

- **Priorities**

- Specific outcomes ranked by County elected officials as the most important to achieve at the State and Federal levels
  - **Full**– An outcome that meets all internal goals originally set
  - **Partial**– An outcome that meets some portion of the internal goals originally set



# Headline Measure 1: Percent of Operating Budget State and Federal Funds



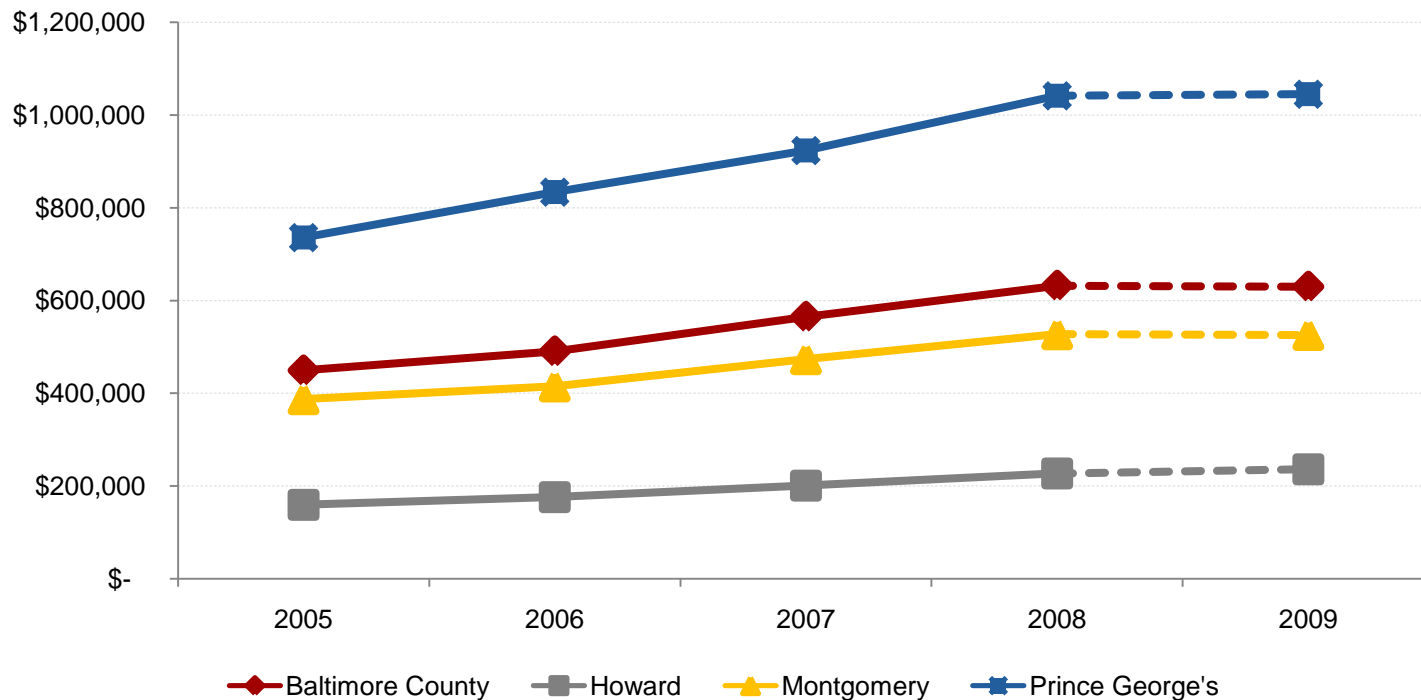
\* Includes an aggregate of Direct State Aid, State Retirement Payments, and Federal CDP's realized.

**IGR's is responsible for bringing in almost 20% of the County's Operating Budget.**



## Sub Measure 1: Direct State Aid

### Direct State Aid (in thousands)



*Note: Direct State Aid is comprised mainly of public K-12 education aid which is allocated based on wealth. This does not include teacher retirement and capital funds.*

**Montgomery County's has had an average increase of 10% per year for Direct State Aid appropriations.**



## Sub Measure 1: Direct State Aid

### What constitutes good performance for this measure?

- Direct State Aid should not decrease over time

### Contributing Factors

- Experienced, skilled, and well connected staff committed to achieving results
- Authority to represent the views of both the County Executive and the County Council so that the County is able to speak with "one voice" at the State level
- A County Executive, County Council, and departmental and agency staff who regularly partner with the IGR to promote the County's agenda at the State level
- Montgomery County has the State's largest delegation, including members holding key leadership positions in the Maryland General Assembly

### Restricting Factors

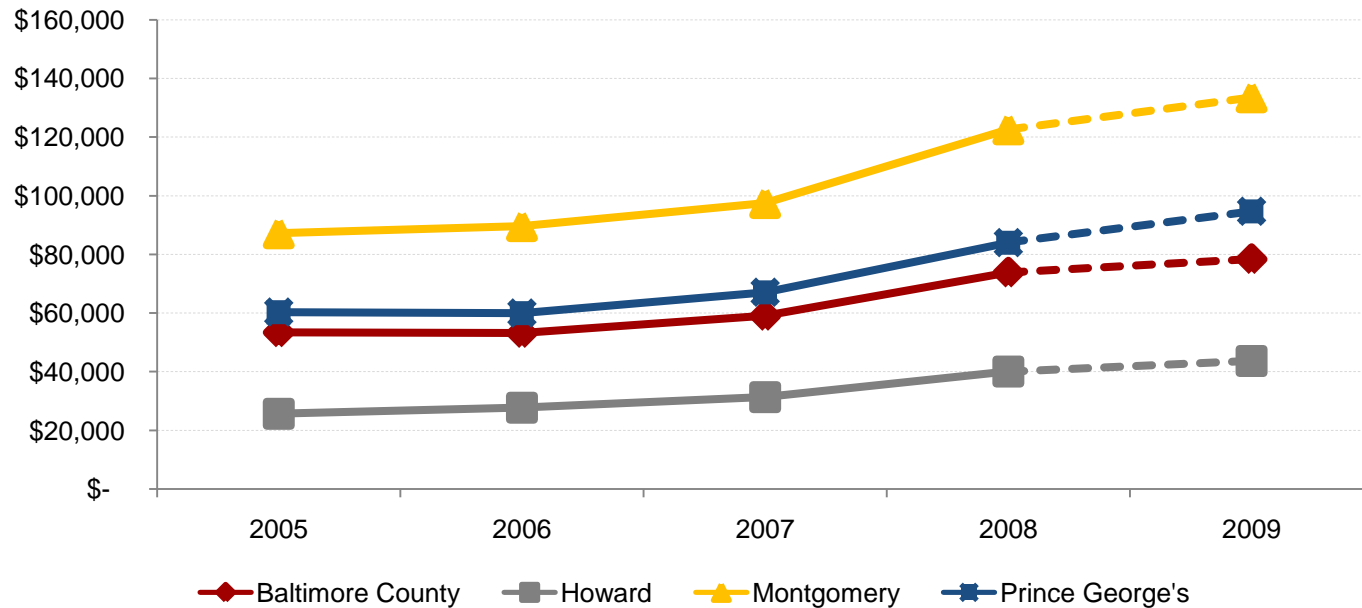
- Lack of access to the most current information during the State legislative session prevents strategies from being adjusted quickly
- County Executive and the County Council may have differing objectives
- Perception of Montgomery County as wealthy and insular
- Current fiscal climate restricts the States ability to allocate additional resources
- Insufficient number of State Delegation members in leadership positions where they are able to influence major fiscal and policy decisions
- Predisposition of some State Delegation members to support fiscal policies that may not be in the County's best interest
- Little control over certain variables that drive formula funds, such as K-12 enrollment, vehicle registrations, etc.





## Sub Measure 2: State Retirement Payments

### State Retirement Payments (in thousands)



*Note: State retirement payments include public K-12 teachers and certain community college faculty. Retirement payments are calculated based on the application of the State's annual contribution rate to the eligible salary base.*

**IGR's lobbying effort are designed to prevent transfer of State retirement obligations to the County. Montgomery County had an average increase of 9% per year for State Retirement Payments.**



## Sub Measure 2: State Retirement Payments

### What constitutes good performance for this measure?

- Ensuring that no part of the State obligation for retirement payments be transferred to the County

### Contributing Factors

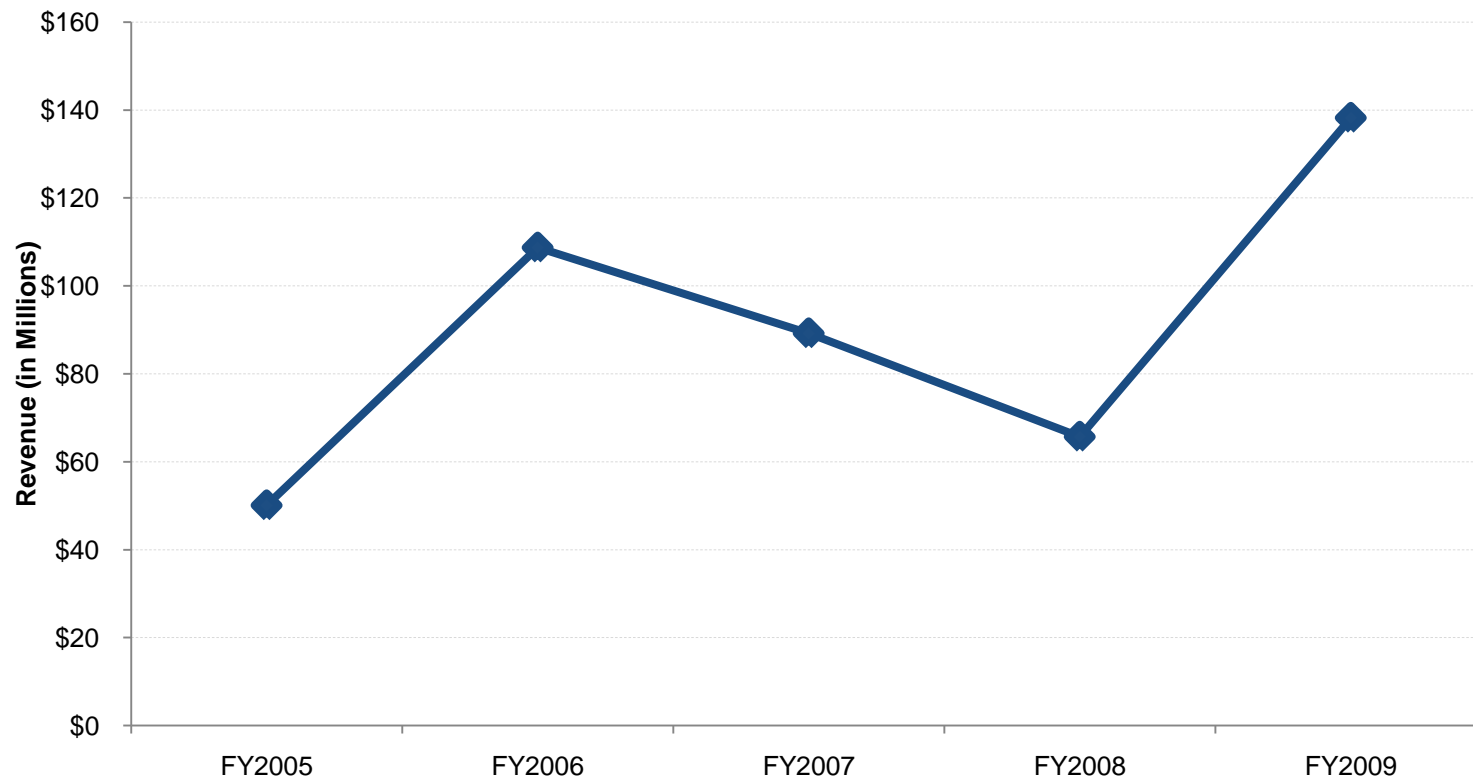
- Experienced, skilled, and well connected staff committed to achieving results
- An action that would allow the State to decrease its current commitment to funding the costs of retirement payments for certain local employees would negatively impact all local subdivisions which creates a strong lobby against a diminished effort by the State

### Restricting Factors

- Lack of access to the most current information during the State legislative session prevents strategies from being adjusted quickly
- Maryland needs to address persistent deficits by reducing spending
- Concerns raised by lawmakers and education advocates dating back forty years that the legal requirement mandating the state fully fund the cost of teacher retirement without adjusting allocations based on the relative wealth of a subdivision exacerbates disparities among the 24 subdivisions



## Sub Measure 3: State Capital Funds Appropriated



\*Does not include transportation

**There are large year-to-year fluctuations in State Capital Funds Appropriated.**



## **Sub Measure 3: State Capital Funds Appropriated**

### **What constitutes good performance for this measure?**

- Securing the highest funding level relative to the capital request made for projects located within Montgomery County

### **Contributing Factors**

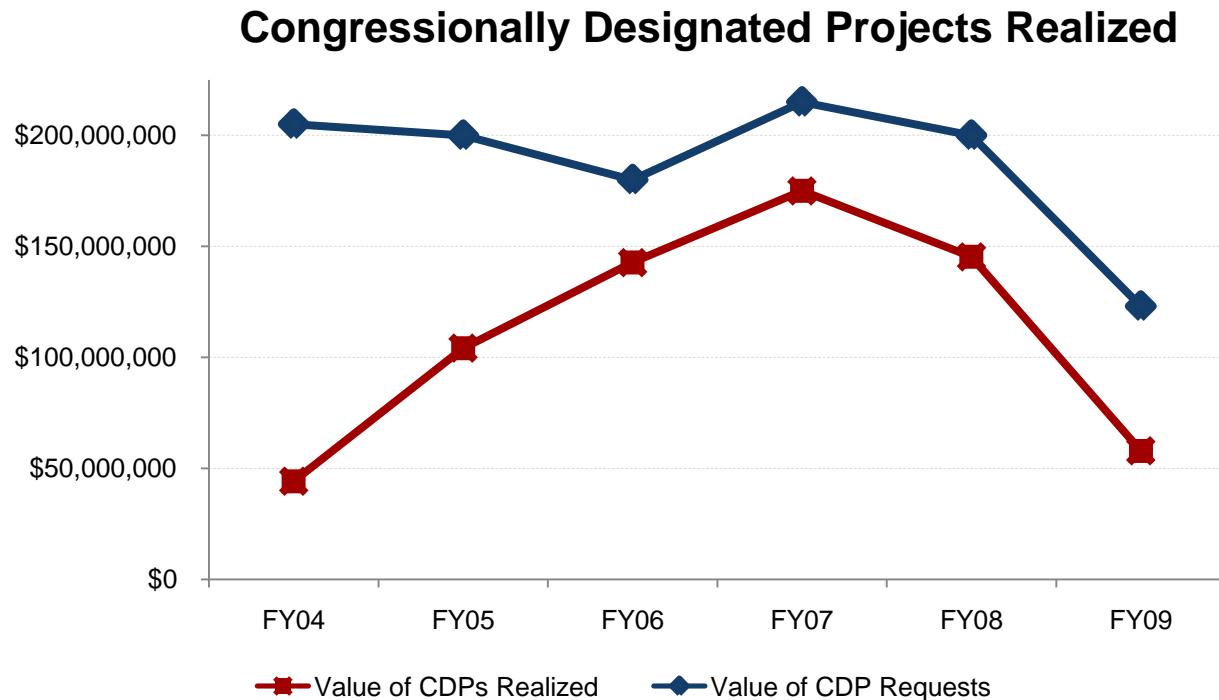
- Experienced, skilled, and well connected staff committed to achieving results
- Authority to represent the views of both the County Executive and the County Council so that the County is able to speak with "one voice" at the State level
- A County Executive, County Council, and departmental and agency staff who regularly partner with the IGR to promote the County's agenda at the State level
- Montgomery County has the State's largest delegation, including members holding key leadership positions in the Maryland General Assembly

### **Restricting Factors**

- Lack of access to the most current information during the State legislative session prevents strategies from being adjusted quickly
- County Executive and the County Council may have differing objectives.
- Perception of Montgomery County as wealthy and insular
- Current fiscal climate restricts the States ability to allocate additional resources
- Insufficient number of State Delegation members in leadership positions where they are able to influence major fiscal and policy decisions
- Predisposition of some State Delegation members to support fiscal policies that may not be in the County's best interest



## Headline Measure 2: Congressionally Designated Projects Realized



**Note:** Congress adopted Continuing Resolutions for fiscal years 2007 and 2009 which effectively funded federal programs at the previous year's level. All earmarks were eliminated from those years with few exceptions including appropriations for FDA/White Oak consolidation, low-income energy assistance, and disaster assistance

**By tracking Congressionally Designated Projects (CDPs), IGR will be able to demonstrate its ability to work with Congress to bring federal funds to the County.**

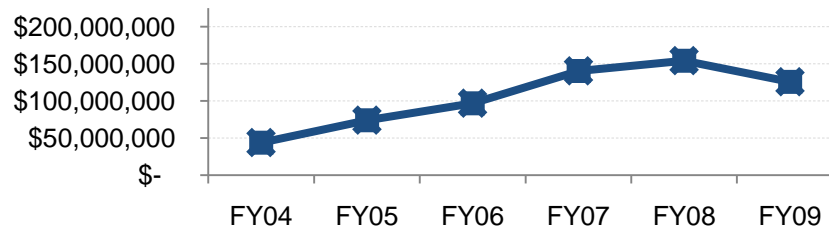


# Headline Measure 2:

## ▪ CountyStat Analysis & Recommendations

- Calculate a rolling three year average of the amount of money appropriated through Congressionally Designated Projects to smooth data anomalies due to federal funding issues
- Benchmark these rolling averages against other comparable jurisdictions
- Track IGR performance over time
- Isolate and determine when a project's appropriations will be counted
  - Projects that span multiple years

**Congressionally Designated Projects  
(Three Year Rolling Average)**



**Using a rolling average will prevent trends in funding from being obscured by year to year fluctuations in Congressional appropriations.**



# Headline Measure 2: Congressionally Designated Projects

## What constitutes good performance for this measure?

- Securing the highest funding level relative to the request for those Congressionally designated projects identified by the County Executive as key federal funding priorities

## Contributing Factors

- Experienced, skilled, and well connected staff committed to achieving results.
- Responsive Congressional Delegation
- Several Congressional Delegation members hold leadership posts
- Authority to represent the views of both the County Executive and the County Council so that the County is able to speak with "one voice" at the Federal level
- A County Executive, County Council, and departmental and agency staff who regularly partner with the IGR to promote the County's agenda at the Federal level

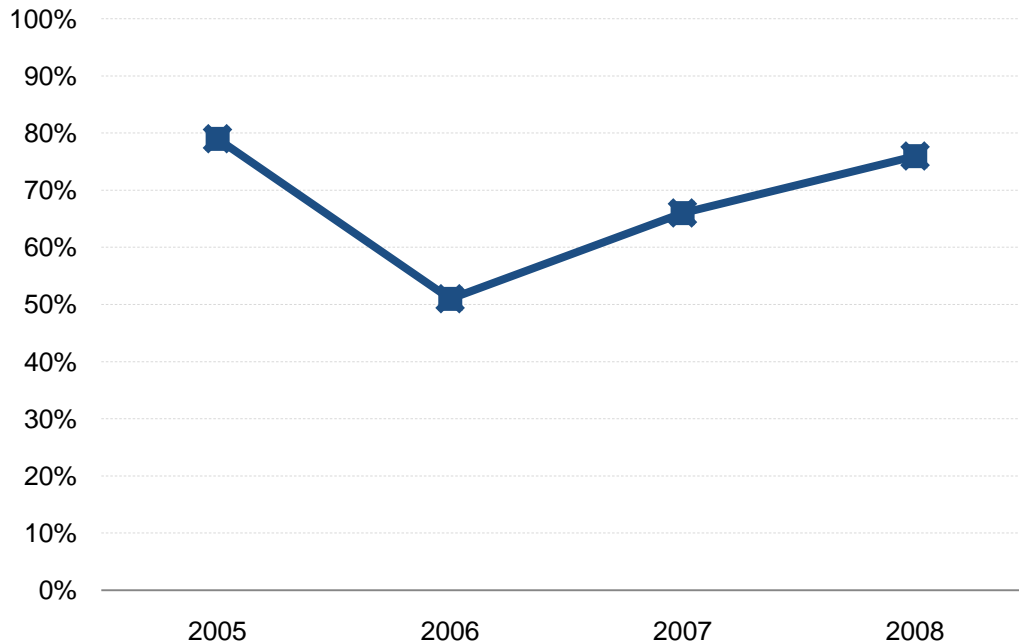
## Restricting Factors

- Perception of Montgomery County as wealthy and insular
- Increasing competition for diminishing resources at the Federal level
- The process for developing the federal priorities submission results in a lengthy list which contains items that may be unrealistic to attain



# Headline Measure 3: Percent of State Legislative Package Where IGR Position Prevailed

State Legislative Package Submissions with Montgomery County's Position Prevailing



Session	Local & Bi-County Bills Introduced	MC Position Prevailed
2005	34	79%
2006	30	51%
2007	30	66%
2008	28	76%

A sign of success is an increasing percent of bills in the State Legislative Package where the County's position prevails.





## Headline Measure 3: Percent of State Legislative Package Where IGR Position Prevailed

### ▪ CountyStat Analysis & Recommendations

- Benchmark against past performance
  - Not all jurisdictions submit similar requests in their State legislative package
- Track IGR performance over time

**In Montgomery County's State Legislative package only County and Bi-County bills that substantially affect the County are included in the count.**



## **Headline Measure 3: Percent of State Legislative Package Where IGR Position Prevailed**

### **What constitutes good performance for this measure?**

- Securing the highest percentage of prevailing positions possible

### **Contributing Factors**

- Experienced, skilled, and well connected staff committed to achieving results
- Authority to represent the views of both the County Executive and the County Council so that the County is able to speak with "one voice" at the State level
- A County Executive, County Council, and departmental and agency staff who regularly partner with the IGR to promote the County's agenda at the State level

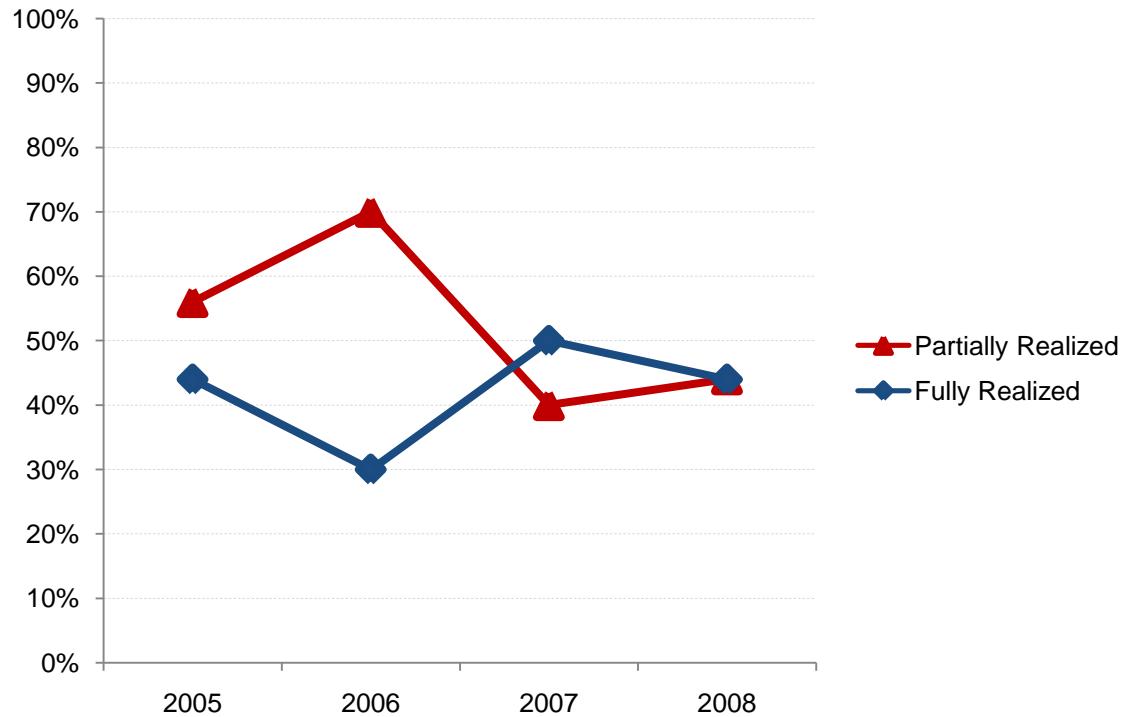
### **Restricting Factors**

- County Executive and the County Council may have differing objectives.
- Perception of Montgomery County as wealthy and insular
- Insufficient number of State Delegation members in leadership positions where they are able to influence major fiscal and policy decisions
- Predisposition of some State Delegation members to support policies that may not be in the County's best interest



## Headline Measure 4: Percent of State Priorities Partially or Fully Realized

Percentage of Montgomery County Priorities  
Partially & Fully Realized



Montgomery County Priorities

Session	Number of Priorities	Fully Realized	Partially Realized
2005	29	44%	56%
2006	30	30%	70%
2007	10	50%	40%
2008	9	44%	44%

**The majority of State Priorities are at least partially realized.**



## Headline Measure 4:

### Percent of State Priorities Partially or Fully Realized

#### What constitutes good performance for this measure?

- Securing the highest funding levels relative to requests and Securing the highest percentage of prevailing positions possible on policy items

#### Contributing Factors

- Experienced, skilled, and well connected staff committed to achieving results.
- Authority to represent the views of both the County Executive and the County Council so that the County is able to speak with "one voice" at the State level
- The County Executive, County Council, departmental, and agency staff regularly partner with the IGR to promote the County's agenda at the State level

#### Restricting Factors

- Lack of access to the most current information during the State legislative session prevents strategies from being adjusted quickly
- County Executive and the County Council may have differing objectives.
- Perception of Montgomery County as wealthy and insular
- Current fiscal climate restricts the State's ability to allocate additional resources
- Insufficient number of State Delegation members in leadership positions where they are able to influence major fiscal and policy decisions
- Predisposition of some State Delegation members to support policies that may not be in the County's best interest



## Headline Measure 5: Percent of Federal Priorities Fully or Partially Realized

Fiscal Year	Federal Priorities Submitted	Fully or Partially Realized Priorities (Includes both CDPs & Authorizations)	Value of CDP Requests	Value of CDPs Realized
2004	35	22	\$ 205,000,000	\$ 44,150,000
2005	48	34	\$ 200,000,000	\$ 104,144,600
2006	50	38	\$180,000,000	\$ 142,725,000*
2007*	50	23	\$ 215,000,000	\$ 175,000,000
2008	50	35	\$ 200,000,000	\$ 145,308,364
2009*	50	22	\$ 123,000,000	\$ 57,800,000

\*In FY2006 Congress adopted a multi-year surface transportation authorization bill (SAFETEA-LU) which included a \$25 million authorization for the Silver Spring Transit Center, bringing the federal funding commitment to the transit center to more than \$50 million.

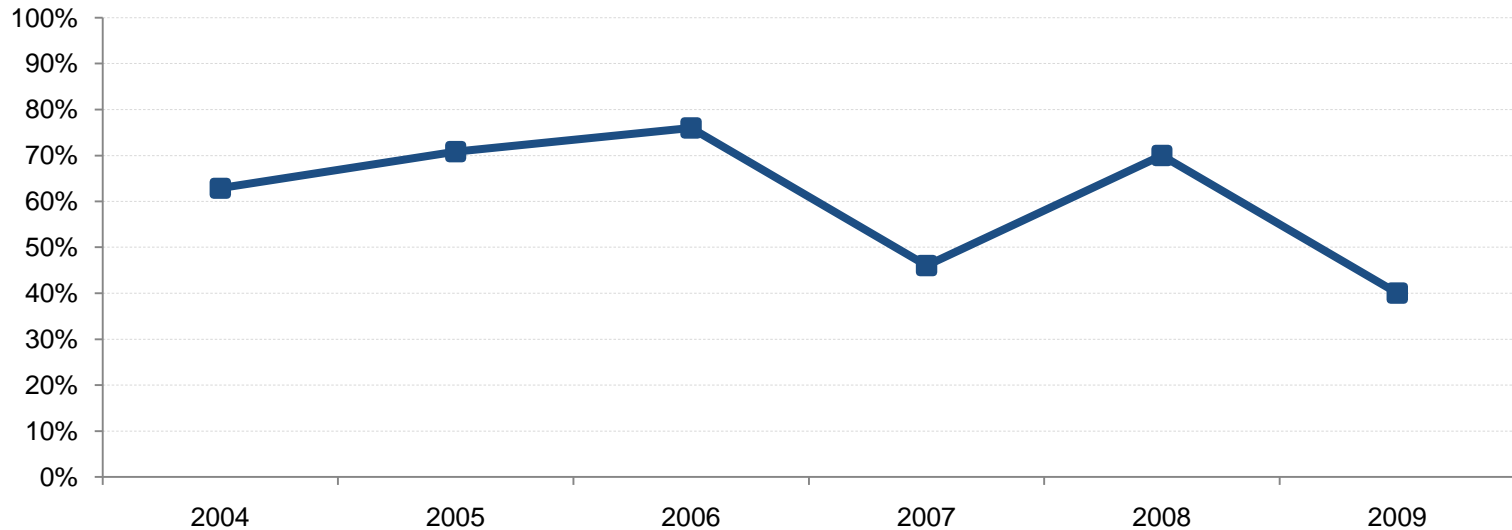
**Note:** Congress adopted Continuing Resolutions for fiscal years 2007 and 2009 which effectively funded federal programs at the previous year's level. All earmarks were eliminated from those years with few exceptions including appropriations for FDA/White Oak consolidation, low-income energy assistance, and disaster

**Priorities include both policy changes and funding requests, not all priorities have a fiscal component.**



## Headline Measure 5: Percent of Federal Priorities Fully or Partially Realized

**Federal Priorities Fully or Partially Realized**



**There has been a decrease in the percentage of Federal Priorities that are at least partially realized between 2006 and the present.**

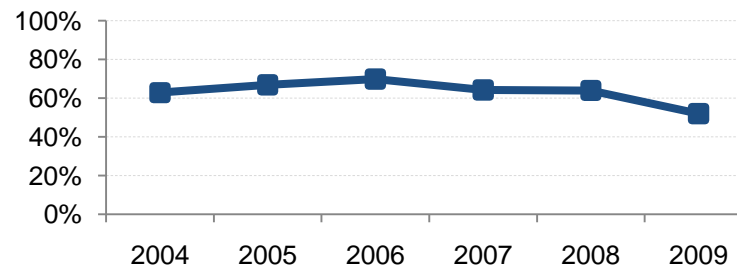


# Headline Measure 5: *Under Construction*

## ▪ CountyStat Analysis & Recommendations

- Calculate a rolling three year average of the number of and amount of money for appropriated for Federal Priorities in order to smooth data anomalies
- Compare with previous performance
- Track IGR performance over time

**Percent of Federal Priorities Fully  
or Partially Realized  
(Rolling 3 Year Average)**



**Using a rolling three year average the amount of priorities appropriated and authorized are declining in fiscal year 2009.**



## **Headline Measure 5:**

### **Percent of Federal Priorities Fully or Partially Realized**

#### **What constitutes good performance for this measure?**

- Securing the highest funding level relative to the request for Congressionally designated projects and the highest percentage of policy items identified by the County Executive as key priorities

#### **Contributing Factors**

- Experienced, skilled, and well connected staff committed to achieving results
- The County Executive, County Council, departmental, and agency staff regularly partner with the Office of Intergovernmental Relations to promote the County's agenda at the Federal level
- Responsive Congressional Delegation
- Several Congressional Delegation members hold leadership posts

#### **Restricting Factors**

- Perception of Montgomery County as wealthy and insular
- Increasing competition for diminishing resources at the Federal level
- The process for developing the federal priorities submission results in a lengthy list which contains items that may be unrealistic to attain





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## Wrap-Up

- **Confirmation of follow-up items**
- **Time frame for next meeting**

